

## Performance Funding Workbook Revisions

### Guidance for 2003-04 Performance Year (Year 8) November 2002 Workbook updated as of October 2003

The information herein provides an outline of the main changes to the workbook since its publication last year.

#### **Changes of Note to Performance Funding for 2003-04 (Year 8)**

It is noted that this past year there were very minor changes made to the performance funding system and performance measures and standards effective for the 2003-04 performance year.

- **Regarding Measurement changes:** Only one measure – 1C, Approval of a Mission Statement – was slightly revised to reflect the on-going review of mission statement revisions. For the remainder of performance indicators, the measures remain the same as in the November 2002 Performance Workbook for the 2002-03 Performance Year.
- **Regarding Performance Standards and Scoring:** During the past year, the performance standards for all measures were reviewed, and it was determined that the standards would remain the same as those used as of the 2002-03 with one exception – 9B, Research Expenditures. For 9B, it was determined that this measure would be deferred from scoring until a revised measure could be developed aligned with new federal financial reporting requirements. For all other indicators, standards remain the same as last year.
- **Regarding CHE Committee charged with oversight of Performance Funding:** One final change of note is that the responsibility for the Performance Funding system has shifted to the Finance and Facilities Committee. The Commission consolidated its number of standing committees by merging the Planning and Assessment Committee responsibilities into the Academic Affairs/Licensing Committee and the Finance & Facilities Committee. This change occurred in September 2004.

#### **Updates to the Workbook**

The workbook remains in the same format as last year. The page numbering has remained consistent. The table below and on the following page serves as a key to the changes made to provide up-to-date guidance for the current performance year (2003-04, Year 8).

#### **General Updates to the Workbook:**

**Indicator Information:** For each indicator, the timeframes for performance measurement have been updated. Additionally, the historical notes have been updated to summarize the current status of the indicator. You will note too that information in the “indicator title” section found to the right of the heading “Date Last Revised” reflects the information of note that has been revised.

References to “Planning and Assessment Committee” or “Division of Planning, Assessment and Performance Funding” have been updated to reflect “Finance and Facilities Committee” or “Division of Finance, Facilities and MIS”, respectively.

**Reporting Schedules:** All schedules for reporting data and any forms, as applicable, have been updated. **Please note that outside of CHEMIS/IPEDS and Institutional Effectiveness reporting, performance data that must be reported separately are due January 30, 2004, for all indicators except 7A for two-year institutions and 7E for USC Beaufort and Regional Campuses. The supplemental information for the latter (7A and 7E) is due March 5, 2004.** See table below for additional details.

*(Performance Funding Workbook Updates, continued)*

**Specific Updates** – Additional updates to information in the workbook is noted in this section. Note that revisions reflected in the “General Updates” provided on the prior page are not referenced.

Page	Item Updated	Notes
iii	Introduction	Updated
I.8	Performance Year Calendar	Updated to reflect 2003-04 dates
I.11	Allocation Methodology	Language revised to reflect wording changes that were adopted in March 2003.
II.5	<b>Research Sector Reference Table</b> of Applicable Indicators and Standards	Single source reference – provides Year 8 indicator measurement/standards info.
II.7	<b>Teaching Sector Reference Table</b> of Applicable Indicators and Standards	Single source reference – provides Year 8 indicator measurement/standards info.
II.9	<b>Regional Campuses Sector Reference Table</b> of Applicable Indicators and Standards	Single source reference – provides Year 8 indicator measurement/standards info.
II.10	<b>Technical Colleges Sector Reference Table</b> of Applicable Indicators and Standards	Single source reference – provides Year 8 indicator measurement/standards info.
II.11	<b>General Reporting Schedule by Indicator</b>	Updated reporting schedule by indicators for 2003-04
II.23	Indicator 1C, Approval of Mission Statement	Measure Definition Revision
II.191	Indicator 9B, Research Expenditures	Change in scoring and indicator status have been updated
Appendix C	Performance Funding Contact Information	Updated contact information for primary and secondary institutional performance contacts
Appendix D	Committee to Advise Performance Funding and Assessment	Provided information regarding the current status

**Reporting Forms** – Updated report forms for data to be reported to Finance, Facilities & MIS Division are included. All forms will be available on-line in word or excel formats -- See [www.che.sc.gov](http://www.che.sc.gov) and select “Performance Funding” under “Finance” heading and see “General Guidance” for link to forms. **Data will be due January 30, 2004, for all except 7A and 7E for 2-year institutions. Supplemental information for 7A and 7E will be due March 5, 2004.**

Page	Updated Form	Notes
II.27	Indicator 1C	Applies to all
II.33	Indicator 1D/E	Applies to all
II.59	Indicator 3D	Applies to all but select Regional Campuses
II.79	Indicator 3E3	Applies to Teaching
II.90	Indicator 4A/B Research	Applies to Research
II.96	Indicator 4A/B Teaching	Applies to Teaching
II.102	Indicator 4A/B Regional Campuses	Applies to Regional Campuses
II.111	Indicator 4A/B Technical Colleges	Applies to Technical Colleges
II.129	Indicator 6A/B MUSC	Applies to MUSC
II.140	Indicator 7A MUSC	Applies to MUSC
II.146	Indicator 7A, 2-Yr Institutions	Applies to Technical & Regional Campuses
II.188	Indicator 9A, USC C, Clemson & Teaching	Applies to USC C, Clemson & Teaching
II.189	Indicator 9A, MUSC	Applies to MUSC